

**(1) First and Final Accounting and Report of Status Administration and Petition
 Thereof and (2) for Final Distribution**

DOD: 8/5/2001	VICTOR W. SIDERS , Administrator with Will Annexed, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Account period: 3/21/03 – 12/8/13	
		Continued from 5/21/14.
Cont. from 041614, 052114		As of 7/3/14 the following issues remain.
Aff.Sub.Wit.		Need Amended First and Final Account based on the following:
Verified		1. Accounting does not comply with Probate Code §1060 et seq.
Inventory		2. Inventory and appraisal was not signed by the probate referee and does not include any property. Attached to the inventory and appraisal is a summary of account that does not comply with Probate Code §1060.
PTC		3. Need Notice of Hearing.
Not.Cred.		4. Need proof of service of the Notice of Hearing on Brian L. Fox pursuant to his Request for Special Notice filed on 3/10/03.
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/3/14
		Updates:
		Recommendation:
		File 1 – Siders

(1) First and Final Account and Report of Executor and Petition for Its Settlement,
 (2) for Allowance of Payment of Ordinary Executor and Attorneys' Fees and Costs,
 and (3) for Final Distribution

DOD: 2-2-98		DIANE M. WINNING , Daughter and Executor with Full IAEA with bond of \$7,000.00, is Petitioner. Account period: 2-2-98 through 4-30-14 Accounting: \$59,080.81 Beginning POH: \$49,899.33 Ending POH: \$33,607.84 (\$30,607.84 cash plus real property valued at \$3,000.00) Executor (Statutory): \$2,327.71 Executor (Reimburse): \$6,723.95 (per itemization in Exhibit E) Attorney (Statutory): \$2,327.71 Costs: \$231.00 Closing: Distribution pursuant to Decedent's will and based on the assets on hand and already distributed: Diane Winning: \$19,811.80 Kent Brockway: \$0 Sheila Brockway: \$0	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner and her attorney are both requesting the entire amount of statutory compensation; however, there is no explanation for the delay in closing the estate. It does not appear to have been in the estate's best interest to delay administration, since there have been numerous expenses over the years, including bond premiums, bank service charges, taxes, insurance, etc., as noted in the disbursements schedule. Pursuant to Probate Code §12205, the Court may reduce the compensation. 2. The disbursements schedule includes numerous line items for "AD&D Ins" beginning in 2007. Need clarification: Why has the estate been paying for accidental death/ dismemberment insurance, and for whom? 3. The disbursements schedule includes numerous line items for "Federal Withholding Debit." Need clarification. Are there tax issues that the estate is aware of? 4. Many of the expenses that Petitioner is requesting reimbursement for are listed in the disbursements schedule. Need clarification regarding the \$6,723.95 requested. 5. Petitioner made various distributions of cash and assets without Court authorization. Need receipts for the cash and assets that they received from the estate from distributees Kent Brockway and Sheila Brockway. 6. Need consents to distribution of the real property in undivided interests from Kent Brockway and Sheila Brockway pursuant to Local Rule 7.12.4, 7. Based on the above, the Court may strike any language confirming and approving the acts of Petitioner during administration.	
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			12-16-02
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
n/a	FTB Notice			
		Reviewed by: skc Reviewed on: 7-2-14 Updates: Recommendation: File 2 - Brockway		

Atty Wright, Janet L (for Gerald H. Blum – Petitioner – Conservator)

(1) Petition for Approval of Eighth Account and Report and (2) for Allowance of Attorney's Fees

Age: 56		GERALD H. BLUM , Conservator, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:	
		Account period: 01/01/2012 -12/31/2013		<p>Note: If the petition is granted status hearings will be set as follows:</p> <p>• Wednesday, 07/06/2016 at 9:00a.m. in Dept. 303 for the filing of the ninth account.</p> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>	
		Accounting - \$163,942.96			
		Beginning POH - \$93,741.07			
		Ending POH - \$91,578.28			
		Current Bond: \$150,000.00			
		Conservator - waives			
		Attorney - \$4,513.75 (document preparation/review, meeting with Petitioner, and court appearances)			
		Accountant - \$2,000.00			
		Costs - \$435.00 (filing fees)			
		Petitioner requests an order allowing Petitioner to make bi-weekly payments to the Conservatee in the approximate amount of \$170.00.			
		Petitioner prays for an Order:			
		1. Approving, allowing and settling the seventh account;			
		2. Authorizing Petitioner to make bi-weekly payments to the Conservatee in the approximate amount of \$170.00;			
		3. Authorizing payment of the attorney's fees and costs; and			
		4. Approving the change of brokerage firms from LPL Financial to Independent Financial Group and the continued engagement of Kenneth Hamada of the Hamada Wealth Management Group as manager of the Independent Financial Group account.			
		Court Investigator Dina Calvillo's report filed 09/12/2013.			
Cont. from					
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	w/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
✓	2620(c)				
✓	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: LV	
				Reviewed on: 07/03/2014	
				Updates:	
				Recommendation:	
				File 3 - Blum	

DOD: 9-19-03	HUBERT DONNY , Co-Executor with Full IAEA without bond, filed his First and Final Report of Administration, and Petition for Final Settlement, and for Final Distribution, Accounting Waived, on 4-10-14.	NEEDS/PROBLEMS/COMMENTS:
<input type="checkbox"/> Aff.Sub.Wit.		1. Need revised order for signature pursuant to Minute Order 5-21-14. Note: There was a proposed order previously submitted for signature at the hearing on 5-21-14; however, it was not signed, and the minute order indicates that an order was to be signed ex parte. However, no new proposed order has been submitted for signature. 2. Need status of supplement pursuant to Minute Order 5-21-14.
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc Reviewed on: 7-3-14 Updates: Recommendation: File 4 - Donny

Status

DOD: 04/17/03	ANNA WINGERT , spouse, was appointed as Executor on 12/13/05.	NEEDS/PROBLEMS/COMMENTS: 1. Need updated status report.
	I & A, Final filed 11/09/06 - \$6,000.00	
	Anna Wingert died on 12/14/06.	
Cont. from		
Aff.Sub.Wit.		
Verified	KEVIN WINGERT , son, was appointed successor executor without bond on 05/21/14. Letters were issued on 05/21/14.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Minute Order from hearing on 05/21/14 set this matter status on 07/09/14.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 07/03/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 5 – Wingert

**Petition for Instructions and Authorization to Obtain a Reverse Mortgage Loan on
Conservatee's Real Property**

		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Petitioner states the Conservatee resides in her own home in Auberry, California. She has a long history of living in motels, board and care homes, and other facilities. Her home provides her with stability that she did not have previously.	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		As of 5-1-14, the Conservatee had a balance of \$12,023 in her Public Guardian pooled trust account. Her monthly expenses exceed her income by a significant amount. In order for the Conservatee to remain in her home, she needs more income or an influx of cash. The only option is to obtain a reverse mortgage on the real property.	
		Although the amount received will not be able to maintain the Conservatee at home for her life, Petitioner believes it will at least allow her to remain there for another 18 months.	
		The Public Guardian intends to obtain the reverse mortgage from Security Lending in Fresno and has been working with a home equity retirement specialist there, who provided the following information specific to the conservatee's real property:	
		The value of the house is approx. \$80,000. The Conservator could access \$41,291.75 of the equity. Due to recent rule changes, \$22,891 would be paid out in the first 12 months. Then she could access the remaining \$18,400.	
		There is an option to take a monthly amount for as long as she lives in the home, but that amount is only \$259.71, and she cannot afford to remain in the home with such a small amount supplementing her current income. Therefore, the Conservator will opt for the two lump sums.	
		As long as the Conservatee remains in her home, she will not have a mortgage payment. In addition, the reverse mortgage loan will not come due until she dies or is required to reside outside of her home for more than one year. The Public Guardian does not intend to move her from her home and does not foresee her requiring a lengthy stay in a hospital or other facility.	
		Petitioner prays that the Court find that it is in the Conservatee's best interest to remain living in her home; and the court authorize the Public Guardian to enter into a reverse mortgage transaction on behalf of the Conservatee to encumber the property as indicated above.	

Reviewed by: skc

Reviewed on:
7-3-14

Updates:

Recommendation:

File 6 – Klein

DOD: 12-21-05	KAMALJIT K. ASHAT , Surviving Spouse, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Petitioner was appointed Administrator of the Estate of Sukhjinder Ashat on 2-10-09.	
Cont. from 042814, 050814, 061814	Decedent died intestate	
Aff.Sub.Wit.		
Verified	Petitioner requests Court confirmation that Petitioner's 50% community property interest in certain real property on Blackstone Ave., in Fresno belongs to her.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Petitioner states she and the decedent acquired the subject property with the earnings and accumulations from said earnings during their marriage; therefore, the property constituted community property of the spouses. Title stands in the decedent's name alone because he purchased the property, with Petitioner's consent, while she was on vacation out of the country and was unavailable to sign purchase and loan documents. The property was reported on the joint income tax returns of the spouses as their community property.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report	Declaration of attorney Cowan (not verified by Petitioner) states Petitioner and the decedent were married on 12-5-81 and provides legal description of property.	
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 7-2-14
		Updates:
		Recommendation:
		File 7A - Ashat

(1) Waiver of Accounting and (2) Petition for Final Distribution and (3) for Allowance of Statutory Attorneys Fees

DOD: 12-21-05		KAMALJIT K. ASHAT , Administrator with full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	<p>Note: On 9-12-13, the Court imposed sanctions of \$500 each to both Attorney Cowin and the Administrator, and also set an Order to Show Cause for 10-17-13. On 10-17-13, the OSC was dismissed, but the Court did not address the sanctions that were imposed on 9-12-13. Therefore, it appears the sanctions remain due. Examiner Notes for hearing 5-8-14 noted that the sanctions remain due; however, Judge Smith continued the matter for Judge Oliver to hear.</p> <p>Declaration of William Cowan filed 6-17-14 states he apologizes to the Court that he was very ill the morning of 4-28-14. He appeared on 5-8-14. He again apologizes to the Court that he was not able to notify his office in time to advise the Court that he could not appear. He respectfully requests that the Court not order sanctions against him.</p>
Cont. from 061814		I&A: \$65,000.00	
<input type="checkbox"/>	Aff.Sub.Wit.	POH: \$65,000.00 (real property interest)	
<input checked="" type="checkbox"/>	Verified	Administrator (Statutory): Waived	
<input checked="" type="checkbox"/>	Inventory	Attorney (Statutory): \$2,600.00	
<input checked="" type="checkbox"/>	PTC	Distribution pursuant to intestate succession:	
<input checked="" type="checkbox"/>	Not.Cred.	Kamajit K. Ashat – Real property interest valued at \$65,000.00.	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/o	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 7-2-14
			Updates:
			Recommendation:
			File 7B - Ashat

**Second Account and Report of Trustee of Christine Romar Beneficiary Trust;
Petition to Settle Account; and to Fix & Allow Trustee and Attorney Fees**

Beneficiary Age: 15		GOOD SHEPHERD FUND , trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 05/01/11 – 04/30/13	<ol style="list-style-type: none"> At the last accounting, it appeared that the beneficiary was a client of CVRC. Therefore, need proof of service at least 15 days before the hearing of <i>Notice of Hearing</i>. Need Order. <p>Note: A status hearing will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, 06/22/16 at 9:00 am in Dept. 303 for filing of the 3rd Account
Cont. from		Accounting - \$72,885.82	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$66,961.53	
<input checked="" type="checkbox"/>	Verified	Ending POH - \$67,078.18	
<input type="checkbox"/>	Inventory	Trustee - \$2,656.25 (per itemization and declaration for 21.25 hours @ \$125/hr.)	
<input type="checkbox"/>	PTC	Attorney - \$1,095.00 (per itemization for 2.4 hours @ \$275/hr. and costs of \$435 for filing fees)	
<input type="checkbox"/>	Not.Cred.	Petitioner prays for an Order:	
<input checked="" type="checkbox"/>	Notice of Hrg	1. Approving, allowing and settling the second account;	
<input checked="" type="checkbox"/>	Aff.Mail w/	2. Authorizing the trustee fees; and	
<input type="checkbox"/>	Aff.Pub.	3. Authorizing the attorney fees and costs reimbursement.	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input type="checkbox"/>	Order x		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 07/03/14
			Updates:
			Recommendation:
			File 8 - Romar

(1) Co-Administrator's Petition for Approval of First and Final Account and Report;
 (2) for Approval of Payment of Statutory and Extraordinary Fees to
 Co-Administrators and Reimbursement of Costs Advanced; (3) for Approval of
 Payment of Statutory and Extraordinary Attorney's Fees; and (4) for Final
 Distribution

DOD: 1-23-11		LESLEY WAGNER and MEAGAN WAGNER, Co-Administrators with Full IAEA without bond, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 7-27-11 through 5-28-14	
	Aff.Sub.Wit.	Accounting: \$220,261.20	
✓	Verified	Beginning POH: \$210,000.00	
✓	Inventory	Ending POH: \$147,962.90 (cash)	
✓	PTC	Co-Administrators (Statutory): \$7,405.22 (To be split \$3,702.61 each)	
✓	Not.Cred.	Co-Administrators (Extraordinary): \$1,000.00 (Per Local Rule 7.18.B.2., for the sale of the real property, to be split \$500.00 each)	
✓	Notice of Hrg	Attorney (Statutory): \$7,405.22	
✓	Aff.Mail	Attorney (Extraordinary): \$1,000.00 (Per declaration, \$500.00 for legal services in connection with the sale of the residence, \$500.00 estate banking matters)	
	Aff.Pub.	Costs: \$435.00 (advanced by the attorney for the filing of this petition)	
	Sp.Ntc.	Reimburse Co-Administrators per itemization set forth in petition for expenses of administration:	
	Pers.Serv.	Lesley Wagner: \$9,603.75 Meagan Wagner: \$1,522.00	
	Conf. Screen	Closing: \$3,000.00	
✓	Letters 7-27-11	Distribution pursuant to intestate succession and Assignment of Interest: Virginia Wagner: \$15,000.00 Lesley Wagner: \$37,834.74 Meagan Wagner: \$37,834.74 Melissa Wagner: \$25,922.23	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		

Reviewed by: skc
Reviewed on: 7-3-14
Updates:
Recommendation:
File 9 – Wagner

NEEDS/PROBLEMS/COMMENTS:

1. Petitioner states that pursuant to the Agreement Among Beneficiaries, Michael Gong-Chun was allowed to purchase the residence at a reduced price, taking into consideration payments made to the mortgage company and rent paid to the estate as his share of the estate. However, he then signed a Disclaimer of Interest in the estate. A disclaimer is irrevocable per Probate Code §281 and results in distribution as if the disclaimant had predeceased the decedent. Petitioner assumes the beneficiaries are now the three remaining siblings pursuant to the Agreement; however, it appears that Michael Gong-Chun's issue are now entitled to his share of the remainder of estate. The Court may require authority for omitting Michael Gong-Chun's issue from distribution of the remainder of the estate with reference to the Disclaimer.

Update: On 6-24-14, Petitioner filed Assignments of Interest from Allan Matthew Gong Chun, Michael Jonathan Gong Chun, and Sherri Elizabeth Gong Chun, children of Michael Gong Chun, that assigned their interests back to the estate.

Examiner's Note: It appears that these assignments provide a solution to the issue created by Michael's disclaimer. However, rather than clear the note, I will leave it to the Court's discretion. However, the following remaining issues do not appear to have been addressed:

2. The agreement and attached lease indicate that Michael Gong-Chun was paying rent; however the Receipts Schedule does not indicate rent received by the estate. Need clarification. Who was the rent paid to? The Disbursements Schedule indicates that the estate was paying for household expenses such as AT&T and mortgage payments after the death of the decedent, when it appears the house was occupied by Michael Gong-Chun. Need clarification.
3. The accounting does not appear to be prepared correctly. The Receipts Schedule includes items that are not "receipts" pursuant to Probate Code §1061(a)(3). For example:

- The estate obtained a \$10,000.00 loan from Jong Chun, to pay off the auto loan before selling the vehicle (which loan was not authorized by the Court pursuant to Probate Code §9800 et seq.). That \$10,000.00 was repaid with interest and is not a "receipt" for purposes of calculating compensation.

- Similarly, Disbursements Schedule indicates \$56.04 was paid to California Baptist Foundation for "Court in Hawaii (Estate Admin.)." Receipts Schedule indicates this same amount was received as reimbursement on 1-10-14. If this was a loan, this amount is also not a "receipt" for compensation purposes.

- The vehicle, originally valued at \$25,000.00, was then sold for \$28,000.00, resulting in a \$3,000.00 gain from the original I&A value. However, in addition to the \$3,000.00 gain, Petitioner included the \$25,000.00 balance as a "receipt." This is not correct. The \$25,000.00 is already included in as an asset on the I&A. That value does not get counted twice in calculating the statutory fee.

- A brokerage account valued at \$8,062.38 is Item No. 2 on I&A Partial No. 2 filed 8-30-12. The transfer of those same funds to another estate account does not constitute a "receipt" because that amount is already included as an asset on the I&A. (Note: Gains Schedule indicates a gain of \$854.60 as accumulated income on this account. However, Petitioner does not state whether the asset changed form (i.e., assets held in the brokerage account sold or liquidated to cash), which would be a gain, or whether cash was simply transferred to another account with interest received, which may just be a receipt. Similar to the vehicle issue, though, the \$8,062.38 does not get counted twice.

By incorrectly categorizing these items as "receipts," the statutory compensation is incorrectly inflated.

Therefore, need amended accounting, including amended calculation of statutory fees and amended final distribution.

4. Need clarification regarding extraordinary fees requested in connection with the Ancillary Probate. The work performed appears to be typical probate work (research, forms, communications, etc.) that would be statutory within that probate matter and should be requested in that matter.

(1) First and Final Account and Report of Administrator and (2) Petition for Allowance of Statutory Commissions and Attorneys' Fees; and (3) for Final Distribution

DOD: 08/30/12		KATRINA BEST KENDALL , Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 12/12/12 – 04/10/12	1. Schedule D (Disbursements) lists 4 disbursements to McCormick Barstow, LLP totaling \$2,132.35. There is no explanation for these fees paid and no request for extraordinary attorney's fees has been made. The Court may require more information concerning these fees.
Cont. from			
	Aff.Sub.Wit.	Accounting - \$78,258.22	2. Need Order. Note: the Order must state the dollar amount to be distributed to each heir (Local Rule 7.6.1)
✓	Verified	Beginning POH - \$61,251.00	
	Inventory	Ending POH - \$25,328.18 (all cash)	
	PTC	Administrator - \$3,130.33 (statutory)	
	Not.Cred.	Attorney - \$3,130.33 (statutory)	
✓	Notice of Hrg	Reserve - \$3,000.00	
✓	Aff.Mail w/		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen	Distribution, pursuant to intestate succession, is to:	
	Letters 12/06/12	Katrina Best Kendall - 1/3	
	Duties/Supp	Yvette Best - 1/3	
	Objections	Kaitlyn M. Best - 1/6	
	Video Receipt	Conrad J. Best - 1/6	
	CI Report	Gannon A. Best - 1/6	
✓	9202		
	Order x		
	Aff. Posting		Reviewed by: JF
	Status Rpt		Reviewed on: 07/03/14
	UCCJEA		Updates:
	Citation		Recommendation:
✓	FTB Notice		File 11 – Best

13A Emelia C. Calnek Trust 12/19/95 (TRUST)**Case No. 13CEPR00946****Atty Lawrence, Anne (Pro Per Beneficiary and Co-Trustee – Petitioner)****Atty Burnside, Leigh W. (for Pamelyn S. Gingold – Co-Trustee – Objector)****Petition of Beneficiary and Co-Trustee to Remove Co-Trustee of the Trust and for the Payment of Attorney Fees**

DOD: 1-28-10		ANNE LAWNECE , Daughter, Beneficiary and Co-Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner requests the Court remove PAMELYN SHARLEY GINGOLD, Co-Trustee, under Probate Code §15642 based on her breach of fiduciary duties as follows:	<u>Cont'd from 12-12-13, 2-13-14, 4-24-14, 5-28-14</u>
Cont. from 121213, 021314, 042414, 052814		Petitioner is a resident of Dove Creek, Colorado, and consequently contacted Ms. Gingold to commence trust administration after the death of the Trustor. Since February 2010, Ms. Gingold has failed to:	Note: Accounting filed 4-9-14 by Co-Trustee Pamelyn Sharley Gingold is Page B.
<input type="checkbox"/>	Aff.Sub.Wit.	<ul style="list-style-type: none"> • Supply a death certificate to Petitioner; • Supply Notification by Trustee to beneficiaries pursuant to Probate Code §16061.7; • Supply notice to Director of Health Care Services pursuant to Probate Code §19202; • Deposit the original Last Will and Testament of the Decedent pursuant to Probate Code §8200; • Record an Affidavit – Death of Settlor (Trustor), Trustee and Beneficiary and Certification of Trust changing title to the Successor Co-Trustees, as a result of the death of the Trustor in connection with the vesting of title in real property; • Supply a Change in Ownership Statement – Death of Real Property Owner to the Fresno County Assessor and a Claim for Reassessment Exclusion for Transfer Between Parent and Child, potentially jeopardizing the ability to have any reassessment of the real property excluded and potentially causing an increase in real property taxes; 	Note: Per Substitution filed 5-28-14, Mr. Bagdasarian no longer represents Petitioner Anne Lawrence.
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		Status Report filed 7-3-14 by Attorney Burnside states as soon as she received the full details of the parties' settlement, she prepared and circulated a draft agreement. Ms. Lawrence had several questions regarding the accounts set up for her three children. All accounts were included in the accounting filed with the Court. Ms. Gingold is endeavoring to collect paperwork requested by Ms. Lawrence and adding Ms. Lawrence as co-trustee onto the accounts. Ms. Lawrence stated she felt not all of the cash had been accounted for, and Ms. Burnside encouraged her to send a complete list of questions or consider filing an objection to the accounting (Page B). An email was received and responded to. At this time, Ms. Burnside believes the issues have been resolved concerning the real property, but not with respect to the accountings. It is therefore requested that both matters be continued for further proceedings.
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<u>SEE ADDITIONAL PAGES</u>	

13A**Dept. 303, 9:00 a.m. Wednesday, July 9, 2014**

Page 2**Petitioner states Ms. Gingold has failed to (Continued):**

- Inventory and appraise any of the assets;
- Maintain the real property located at 5887 W. San Gabriel in Fresno;
- Provide any accounting, including all bank statements, receipts, and disbursement pursuant to Probate Code § 17200(b)(7)(B) and §§ 16062 and 16063;
- Petitioner alleges that Ms. Gingold has lived in the property without payment of rent, has used trust assets to pay for utilities, cable, and other items for her sole personal use;
- Ms. Gingold has failed to assemble personal property, which is depreciating in value, in order to auction or sell, or provide notice to beneficiaries as to whether said personal property should be distributed;
- Ms. Gingold has failed to provide any information re life insurance policies, final expense bills, or other related financial information;
- Ms. Gingold has failed to file the appropriate income tax returns, estate tax returns, and other tax reporting requirements for the trust on a timely basis; and
- Ms. Gingold has exhibit hostility and impairing the administration of the trust, which is reflected as grounds for removal pursuant to Probate Code § 15642(b)(3).

Additional information:

- The Trustor of the **EMELIA C. CALNEK TRUST** was also known as **EMELIA CHARLOTTE JENNRICH** (see death certificate).
- The real property asset of the estate located at 5887 W. San Gabriel in Fresno refers to "**EMILIA C. CALNEK JENNRICH, Trustee of the EMILIA C. CALNEK TRUST**" (see Grant Deed).
- The **Sixth (6th) Amendment**, attached as Exhibit C, dated 6-28-07 nominates Petitioner and Ms. Gingold as Co-Trustees. A letter from Attorney Steve H. Murphy dated 6-8-10 confirms.
- There are eight **(8) beneficiaries**. Petitioner lists names, but not relationships.
- Declaration of No Service filed 11-25-13 indicates that a process server made numerous attempts to serve Ms. Gingold at the San Gabriel address; however, no one answers the door. Declaration filed 12-10-13 indicates additional attempts to serve Ms. Gingold at two other addresses in Mariposa, CA.

Petitioner requests that:

1. **The Court remove the Successor Co-Trustee PAMELYN SHARLEY GINGOLD from office and appoint ANNE LAWRENCE as the sole Successor Trustee of the EMELIA C. CALNEK TRUST dated December 19, 1995;**
2. **The Court order PAMELYN SHARLEY GINGOLD to provide a full accounting from the date of death of the decedent of 1-28-10 to the date of her removal;**
3. **The Court order Attorney's fees of the Petitioner to be paid in an amount to be determined;**
4. **The Court make all further and proper orders.**

SEE ADDITIONAL PAGES

Dept. 303, 9:00 a.m. Wednesday, July 9, 2014

Page 3

Objection filed 12-9-13 by Co-Trustee Pamelyn S. Ginsold admits certain facts as stated above regarding the name of the Trustor, the real property as an asset of the trust, and the nomination of Petitioner and Objector as co-trustees; however, Objector denies the allegations of Petitioner in Paragraph 6 and all subparagraphs, except as follows:

Ms. Gingold denies residing at the San Gabriel property, and denies that Jeremiah Gingold and Serena Katherine Gingold have ever resided there. Petitioner knew they do not reside there, yet served documents at that address to avoid providing actual notice of these proceedings to Ms. Gingold, Jeremiah, and Serena Gingold. Additionally, Ms. Gingold is informed and believes and thereon alleges that the decedent's surviving spouse, **EDWARD W. JENNRICH**, is entitled to notice of these proceedings as he may have a beneficial interest in the San Gabriel property under the terms of the Sixth Amendment.

Ms. Gingold states: She and Petitioner are the daughters of the decedent. Decedent was survived by her spouse, Edward W. Jenrich, whom Ms. Gingold is informed, believes, and thereon alleges now resides in Pasadena California, by her two daughters, Ms. Gingold and Petitioner, her son Peter J. Deyell, and five grandchildren. All of these individuals are named beneficiaries under the Sixth Amendment.

Decedent was also survived by a son, David A. R. Deyell, but he is not a beneficiary under the Sixth Amendment. He also appears to be disinherited under the terms of Decedent's will dated 3-16-00 (attached).

Following Decedent's death in Jan 2010, Ms. Gingold and Petitioner gathered Decedent's estate planning documents and Petitioner took them to her home in Colorado. Petitioner therefore had the 1995 Trust instrument and all amendments thereto in her possession. Ms. Gingold thus denies Petitioner's allegation that she withheld copies from Petitioner or any other beneficiary.

Ms. Gingold states neither she nor Petitioner retained legal counsel to advise them regarding administration of the trust. Ms. Gingold understood that as a co-trustee, she was to maintain the San Gabriel residence and pay expenses related to the maintenance and assets of the trust, and has done so. The decedent's final expenses were paid as well as ongoing expenses related to the real property. Ms. Gingold has supervised the upkeep of the property, maintained a trust checking account with Petitioner as co-trustees, which Petitioner has access to, and has made distributions to beneficiaries according to the Sixth Amendment. She prepared an inventory of the contents of the house and obtained appraisal of the contents and discussed with Petitioner. Petitioner at all times consented to Ms. Gingold's handling the responsibilities and never voiced any objection or disagreement. Rather, Petitioner expressed her preference that Ms. Gingold undertake these responsibilities, as she resides in Colorado, and Ms. Gingold, a resident of Mariposa, was better situated to handle administration of Fresno assets.

SEE ADDITIONAL PAGES

Objector states (Continued):

To the extent that any administrative tasks went undone, Ms. Gingold was unaware of such tasks. She was not represented by counsel. Petitioner, on the other hand, was employed as a paralegal for a law firm and is now a clerk of the Dolores County Court in Colorado. Petitioner represented that she would determine and inform Ms. Gingold of any and all tasks of a legal nature required for administration. Aside from the responsibilities that Ms. Gingold has undertaken (bill pay, etc.), Petitioner never identified any tasks for her to complete.

Ms. Gingold submits that Petitioner had an equal responsibility to complete the administrative tasks, and to the extent there is any fault on the part of Ms. Gingold, which she denies, Petitioner is equally at fault. Petitioner has not set forth sufficient grounds to justify Ms. Gingold's removal, an order compelling her to account, or an award of attorney's fees.

Objector requests that the Court deny each and every claim for relief in the Petition; award Objector her costs incurred in this matter; and order any and all further relief the Court deems just and proper.

Status Report filed 2-5-14 by Attorney Burnside (for Objector) provides details of the dispute including communications, distributions, and account access, and states the balance presently remaining in the trust checking account is approx. \$15,000.00, and the remaining property on hand includes the San Gabriel St. residence, the funds in the checking account, and the various personal property items in the home.

Status Report filed 2-10-14 by Attorney Bagdasarian (for Petitioner) states Gingold has failed to provide accounting or any information concerning the distribution of \$114,000 or for whose benefit, leading to the conclusion that the funds have been misappropriated. The real property has been allowed to deteriorate due to Gingold's failure to arrange maintenance; thereby resulting in a loss to the trust estate. Based on the lack of cooperation in providing an accounting or information concerning distributions, Petitioner again requests that Gingold be removed as co-trustee and all assets be turned over to Petitioner in order to complete the trust administration.

Supplemental Status Report filed 2-11-14 by Attorney Burnside (for Objector) provides additional details of distributions and the approximate balance in each beneficiary's account. Ms. Gingold disputes that the property has deteriorated and caused loss to the estate, and further asserts that Ms. Lawrence has made no effort to assist with maintenance. Trust administration is presently moving forward, and Ms. Gingold is consulting with another real estate agent for listing the property. Attorney Burnside is waiting to hear from Mr. Bagdasarian re his client's wish for disposition of the personal property remaining on hand – can it be sold via estate sale or distributed to beneficiaries or disposed of in some other manner?

Note: Notice of Settlement filed 5-20-14 indicates that the parties have reached a settlement regarding this petition.

However, no settlement agreement or request for dismissal has been filed; therefore, the petition is still pending. Also, the account filed 4-9-14 at Page B is also pending.

14A Douglas E. Coolidge (Estate)

Case No. 14CEPR00352

Atty Helon, Marvin T (for Randall D. Coolidge and Tracie Coolidge-Fierro – Petitioners)

Atty Janisse, Ryan M. (for Dianne E. Coolidge – Objector)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 02/18/2014		RANDALL D. COOLIDGE and TRACIE COOLIDGE-FIERRO , children, are petitioners and request appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS: 14B is the competing petition filed by Dianne E. Coolidge, Surviving Spouse.
Cont. from 052914		Petitioners waive bond	<p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, 12/10/2014 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 09/09/2015 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/>	Aff.Sub.Wit.	Limited Authority – o.k.	
<input checked="" type="checkbox"/>	Verified	Residence: Fresno	
<input type="checkbox"/>	Inventory	Publication: The Business Journal	
<input type="checkbox"/>	PTC	Estimated value of the Estate:	
<input type="checkbox"/>	Not.Cred.	Personal property - \$15,000.00	
<input checked="" type="checkbox"/>	Notice of Hrg	Real property - \$660,000.00	
<input checked="" type="checkbox"/>	Aff.Mail	Total: - \$675,000.00	
<input type="checkbox"/>	Aff.Pub.	Probate Referee: Steven Diebert	
<input type="checkbox"/>	Sp.Ntc.	Petitioners state that they are the children of the decedent and entitled to priority for appointment as administrators under Probate Code §8461(b). Decedent and Diane E. Coolidge had held themselves as husband and wife, however petitioners believe they may not have been legally married. Even if Dianne E. Coolidge is found to be a surviving spouse, she has failed to timely petition for her appointment as personal representative and pursuant to Probate Code §8468 the Court can and should now appoint petitioners as administrators.	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Please see additional page

Reviewed by: LV

Reviewed on: 07/02/2014

Updates:

Recommendation:

File 14A - Coolidge

14A

Dept. 303, 9:00 a.m. Wednesday, July 9, 2014

Opposition to Petition of Randall D. Coolidge and Tracie Coolidge-Fierro for Letters of Administration filed by Attorney Ryan M. Janisse on 05/23/2014 states that the decedent and Dianne E. Coolidge were married in the County of Mohave, State of Arizona, on 11/12/1993. They remained married until decedent's death on 02/18/2014. Decedent died in a tragic fire which consumed the Coolidge residence. The undisputed evidence before this Court is that Mrs. Coolidge is the surviving spouse of the decedent. Concurrently with the filing of this Opposition, Mrs. Coolidge has filed a competing Petition for Letters of Administration seeking her appointment as administrator.

The petitioners Randall D. Coolidge and Tracie Coolidge-Fierro are the decedent's estranged children. In their Petition, Randall and Tracie assert that Mrs. Coolidge is an "alleged spouse" and that decedent and she were never married. This is false.

Probate Code §8461 sets for the order of priority for appointment of an administrator of the state of a decedent as follows: "(a) Surviving Spouse...(b) Children...."

Because Mrs. Coolidge is the surviving spouse she is assigned priority to (a). Petitioners, as the decedent's children, are assigned to (b). Accordingly, the Petition for Letters of Administration filed by Mrs. Coolidge must be granted and the competing petition filed by Randall and Tracie must be Denied.

Therefore, Dianne E. Coolidge respectfully requests that this Court grant her Petition for Letters of Administration and deny the Petition for Letters of Administration filed by Randall and Tracie.

Declaration of Dianne E. Coolidge in Support of Opposition to Petition of Randall D. Coolidge and Tracie Coolidge-Fierro for Letter of Administration filed 05/23/2014 states she is the surviving spouse, on 11/12/1993, she and Doug married in the Mohave County, Arizona. A true and correct copy of Mohave County Clerk of Superior Court Certified Abstract of Marriage is attached. Decedent and Dianne remained married until the time of his death.

Reviewed by: LV
Reviewed on: 07/02/2014
Updates:
Recommendation:
File 14B – Coolidge

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 12/19/13		BRET HELGREN , step-son/named Executor without bond, is Petitioner. Full IAEA – NEED PUBLICATION Will dated 04/13/12 Residence: Fresno Publication: NEED <u>Estimated Value of the Estate</u> Real property - \$359,000.00 Probate Referee: STEVEN DIEBERT	NEEDS/PROBLEMS/COMMENTS: 1. The Petition states that the decedent's spouse is deceased. Need name and date of death of deceased spouse (should be listed in item 8) (Local Rule 7.1.1D).
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit. s/p		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: JF	
		Reviewed on: 07/03/14	
		Updates: 07/08/14	
		Recommendation:	
		File 15 - Chadwick	

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and Failure to File a First Account or Petition for Final Distribution

DOD: 08/10/2002	GINA QUISTIANO , daughter, was appointed Executrix with full IAEA without bond on 09/02/2003.	NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR. Order Settling Final Report of Successor Administrator of Insolvent Estate signed 06/18/2014.
Cont. from 011014, 041014	Letters issued on 09/03/2003.	Minute Order of 01/10/2014: Mr. Zavala is appearing via CourtCall. Counsel informs the Court that he has made contact with Gina Quistiano.
	Inventory and Appraisal was due 01/2004.	
Aff.Sub.Wit.	First Account or Petition for Final Distribution was due 11/2004.	1. Need Inventory and Appraisal and First Account or Petition for Final Distribution.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Former Status Report filed on 01/02/2014 states: Counsel received the Court's Notice re Case Management Conference. Counsel has made efforts to contact Executrix, Gina Zavala, via telephone and email messages, without success.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Counsel herein requests that the matter be continued for at least 45 days for counsel to file a Motion to Withdraw as Counsel of Record, due to the Representative's failure to make contact with counsel.	
Conf. Screen		
Letters		
Duties/Supp	As a result of the Executrix's failure to make contact with Counsel, Counsel is unable to file the next set of documents to bring the matter to a close.	
Objections		
Video Receipt		Reviewed by: LV
CI Report		Reviewed on: 07/02/2014
9202		Updates:
Order		Recommendation:
Aff. Posting		File 16 – Quistiano
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

17 **Lillian Salwasser (Estate)** Case No. 07CEPR00104
 Atty Matthai, Edith (for Craig A. Houghton – Objector)
 Atty Manock, Charles K. (for George Salwasser/Executor of the Estate of Lillian Salwasser)
 Atty Chielpegian, Michael S (for Marvin Salwasser/Administratoor with Will Annexed of Walter Salwasser Respondent)
 Atty Wright, Janet L. (for George Salwasser/Executor)
 Atty Farley, Michael L. (of Visalia, for Gary E. Salwasser - Beneficiary)
 Status Hearing

		George Salwasser is Executor.	NEEDS/PROBLEMS/COMMENTS:
		An Amended and Restated First Account was filed on 1-13-10 and has been continued with reference to additional ongoing matters in this and other related cases.	<u>OFF CALENDAR</u>
		This status hearing was set on 4-26-13.	
Cont. from 060713, 080913, 100413, 011014, 041014, 050814, 062314		Status report filed 6-6-13 by Attorney Janet Wright states counsel met and conferred on 5-16-13 with attorneys Craig Houghton and Mark Poochigian of Baker Manock & Jensen, who represented the Executor in his initial appointment through December 2008, and in various extraordinary matters, and with Executor, to review the proposed Petition for Final Distribution on Waiver of Account.	Petition to Close and Distribute Estate on Approval of Partial Account and to Approve Payment of Attorney's Statutory and Extraordinary Fees filed 7-8-14 is set for hearing on 8-19-14.
	Aff.Sub.Wit.	It was determined that in order to close the estate pursuant to the Memorandum of Settlement Agreement entered into by beneficiaries Gary Salwasser and George Salwasser after mediation, certain matters would need to be addressed:	
	Verified	<ol style="list-style-type: none"> 1. Amendment to estate tax return 2. Inventory and Appraisal for promissory notes (preliminary payment history attached) 	
	Inventory		
	PTC	Once the amendment to the estate tax return is completed, it should be possible to create a formula taking into account the allocation of fees and costs pursuant to the agreement and any credits due beneficiaries which would allow the petition to be filed and estate to be closed.	
	Not.Cred.		
	Notice of Hrg	Counsel is developing a draft formula and will meet and confirm with counsel for Gary Salwasser as well as Baker Manock & Jensen. If a formula cannot be agreed upon, the Petition will be filed specifying the areas of dispute.	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc Reviewed on: 7-2-14 Updates: 7-8-14 Recommendation: File 17 – Salwasser

18	Theresa Gutierrez Martin (Estate)	Case No. 13CEPR00054
Atty	McCloskey, Daniel T. (for Joseph W. Martin – Administrator – Petitioner)	
Atty	Casheros, Jerry D. (for Mary J. Quin – Respondent)	
	Petition to Determine Title and Request Transfer of Personal Property to the Estate and Assess Statutory Damages Thereto Against Mary J. Quin	

			NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Petition dismissed per Minute Order 4-10-14 Petition for Final Distribution filed 6-19-14 is set for hearing on 7-28-14
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections	X	
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Atty Kruthers, Heather H., of County Counsel's Office (for Public Administrator, Successor Trustee)
Status Hearing

DOD: 3/12/2010	JOHN R. PANZAK, JR. , son, served as Trustee of the JOHN ROBERT PANZAK LIVING TRUST dated 11/27/2000 since the Decedent's death in March 2010.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 6/4/2014.</u> Minute Order states Mr. Panzak is appearing specially for Attorney Randy Risner. Mr. Panzak advised the Court that it is his understanding that Ms. Kruthers is requesting a continuance. Matter continued to 7/9/2014. Notes Re Related Estate of John R. Panzak, Sr., Case #10CEPR00505: <ul style="list-style-type: none"> The Panzak, Sr. Estate is a related matter in which the PUBLIC ADMINISTRATOR was appointed Administrator of the Estate by Minute Order dated 4/29/2013. Order Settling First and Final Account and Report of Deceased Personal Representative was filed on 3/13/2014 in the Panzak, Sr. Estate, representing the final account of the deceased personal representative, JOHN R. PANZAK, JR. (DOD 2/15/2013.) Panzak, Sr. Estate is currently pending closure by the PUBLIC ADMINISTRATOR.
Cont. from 070813, 080513, 100713, 110613, 010814, 022014, 040314, 050514, 060414	Beneficiaries of the Decedent's Will are John R. Panzak, Jr., Gordon Panzak, and the JOHN ROBERT PANZAK LIVING TRUST ; beneficiaries of the JOHN ROBERT PANZAK LIVING TRUST are John R. Panzak, Jr., and Gordon Panzak.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	Petition for Appointment of Successor Trustee was filed 3/11/2013 by SHARON PANZAK , spouse, stating the Successor Trustee, JOHN R. PANZAK, JR. , died on 2/15/2013, and requesting she be appointed successor trustee.	
	Objections to and Opposition to Sharon Panzak's Petition for Appointment of Successor Trustee was filed 4/24/2013 by GORDON PANZAK , claiming the position of successor trustee vested in him no later than 3/18/2013 as the second named successor trustee of the Trust.	
	Minute Order dated 4/29/2013 from the hearing on Sharon Panzak's petition for appointment of successor trustee states: "The petition is denied as to Sharon Panzak and the Court appoints the PUBLIC ADMINISTRATOR as successor trustee. Order Appointing Public Administrator as Successor Trustee was filed 5/22/2013.	
	Minute Orders dated 7/8/2013, 8/5/2013, 10/7/2013, 11/6/2013, 1/8/2014, 2/20/2014 and 4/3/2014 state only continuation dates of the Status Hearing, ending with the continuance to 5/5/2014.	
		Reviewed by: LEG
		Reviewed on: 7/7/14
		Updates:
		Recommendation:
		File 19 – Panzak

			TEMP DENIED 5-22-14	NEEDS/PROBLEMS/COMMENTS: Note: Petitioner resides in Moorhead, Minnesota. If this petition goes forward, the following issues exist: 1. The father was served by mail; however, Probate Code §1511 requires personal service. The Court may require continuance for proper notice. 2. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Unknown Paternal Grandfather - Donna Dusan (Paternal Grandmother) - Benjamin Mathis (Maternal Grandfather)
			THERESA HERZBERG , Aunt, is Petitioner.	
			Father: JACOB DUSAN - Served by mail on 6-2-14	
			Mother: JENNIFER MATHIS (Deceased)	
			Paternal Grandfather: Unknown Paternal Grandmother: Donna Dusan	
			Maternal Grandfather: Benjamin Mathis Maternal Grandmother: Cheryl Ceredi (Deceased)	
			Sibling: Gissele Jimenez - Personally served 5-16-14	
			Petitioner states the mother committed suicide in January 2014 and the maternal grandmother committed suicide in April 2014. The father is incarcerated. The minor is currently living with his uncle; however, this is not a safe or stable environment. The uncle already has three children, including an infant, and does not have a home or vehicle large enough for four children. In addition, he has a history of drug use and crime. See petition for details.	
			Objection filed 5-21-14 by Adolph Ceredi, Uncle, states he has an established relationship with Vincent. Vincent does not know the Petitioner. Vincent has a connection with many family members in California and a cross-country move would be an additional loss for him. Mr. Ceredi is planning to move to a larger home in the summer so as not to disrupt the children's school. Vincent sees a therapist and gets good grades. He is not left alone with relatives mentioned by the Petitioner. Vincent has Wraparound services that provide support to him and the family, and Mr. Ceredi is looking into additional services as well (suicide support, etc.). Mr. Ceredi states he was in the process of pursuing legal guardianship.	
			Objection filed 7-7-14 by Donna Dusan, Paternal Grandmother, states the petitioner lives out of California. He would be too far from his family here. Vincent has expressed that he does not know the petitioner and prefers to remain in California.	
			Court Investigator Dina Calvillo filed a report on 7-1-14.	
	Aff.Sub.Wit.			Reviewed by: skc Reviewed on: 7-3-14 Updates: 7-8-14 Recommendation: File 20 – Dusan
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
	Conf. Screen			
	Letters	X		
✓	Duties/Supp			
✓	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
	Order	X		
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 12/9/12	RICHARD RAMOS was appointed Executor without bond and with full IAEA authority on 1/23/14.	NEEDS/PROBLEMS/COMMENTS: 1. The corrected inventory and appraisal filed on 6/30/14 lists a Franklin Templeton Investment Account and U.S. Savings Bonds on attachment 1 (personal representative appraised). Investment accounts and savings bond must be listed on attachment 2 and appraised by the probate referee.
	Letters issued on 1/23/14.	
Cont. from 062014	Inventory and appraisal filed on 3/14/14 – incomplete.	
Aff.Sub.Wit.	Corrected Inventory and Appraisal filed on 6/30/14 shows the value of the estate at \$137,148.93.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: KT
		Reviewed on: 7/3/14/14
		Updates:
		Recommendation:
		File 21 - Melgoza

	NO TEMP REQUESTED		NEEDS/PROBLEMS/COMMENTS:
	ANA LAURA and SAMUEL ROJAS, Maternal Grandparents, are Petitioners.		
	Father: DEVONTE ROBINON Mother: CINDY ROJAS		
	Paternal Grandfather: Unknown Paternal Grandmother: Unknown		
	Petitioners state guardianship is necessary due to the mother constantly leaving the child with Petitioners for days at a time. The child currently lives with them.		
	Court Investigator Julie Negrete filed a report on 7-2-14.		
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail	x	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	x	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			1. Need Notice of Hearing.
			2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Devonte Robinson (Father) - Cindy Rojas (Mother)
			3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Unknown Paternal Grandfather - Unknown Paternal Grandmother
			Reviewed by: skc
			Reviewed on: 7-3-14
			Updates:
			Recommendation:
			File 22 – Rojas

			GENERAL HEARING 7-28-14	NEEDS/PROBLEMS/COMMENTS:
			SHARON SCHRIVES , non-relative (friend), is petitioner and requests appointment as Temporary Conservator of the Person and Estate with bond of \$40,000.00.	Court Investigator advised rights on 7-2-14.
			Petitioner requests authority to move the proposed Conservatee from his residence into a care facility during the temporary conservatorship.	1. Mr. Mardis has already been moved to the care facility in Visalia, which is in Tulare County, and is expected to remain there. The Court may require clarification regarding Fresno as appropriate venue.
	Aff.Sub.Wit.		Estimated value of estate: Personal property: \$ 16,040.00 Annual income: \$ 19,528.00 Recovery: \$ 3,557.00 Total bond required: \$ 39,125.00	2. Need clarification re the proposed conservatee's date of birth. File documents contain conflicting dates.
✓	Verified			
	Inventory		Petitioner states the proposed Conservatee is 81 years old and suffers from severe dementia as well as other medical issues. Petitioner has been his caregiver for several years; however, it has now been determined that he needs additional care in a skilled nursing facility. Petitioner proposes to move the proposed Conservatee from his residence in Coalinga, California into Redwood Springs Health Care Center in Visalia, California on a private pay basis as soon as possible. Consequently, in order to access the funds of the Conservatee, temporary conservatorship of the persona and estate are necessary.	3. Need proof of <u>personal</u> service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing on the proposed Conservatee Barber L. Mardis pursuant to Probate Code §2250(e).
	PTC			
	Not.Cred.		Court Investigator Jennifer Young filed a report on 7-3-14.	Reviewed by: skc
✓	Notice of Hrg			
✓	Aff.Mail	W		Reviewed on: 7-3-14
	Aff.Pub.			Updates: 7-8-14
	Sp.Ntc.			Recommendation:
	Pers.Serv.	X		File 23 – Mardis
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			